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PHILIP MORRIS USA INTER-OFFICE CORRESPONDENCE
120 PARK AVENUE, NEW YORK, NY 10017-5592

TO: Distribution **DATE:** October 7, 1996

FROM: Distribution System Information / Biren Shah

SUBJECT: **Nielsen Topline Report - September 1995**

The following monthly Topline report for September 1995 is based on the Nielsen Integrated Panel, with September monthly data representing the five-week period from 8/27/95 to 9/30/95.

SUMMARY

- PM's monthly share was off -0.1 point versus month-ago to 47.1%, with PM Discount losses more than offsetting PM Premium gains.
- RJR's monthly share was stable at 27.5%.
- The Discount category's monthly share was down -0.1 point to 28.5%, matching its lowest level year-to-date.

FINDINGS

- PM's September share was down -0.1 point versus month-ago to 47.1%, with PM Discount losses (primarily Basic and PL) more than offsetting PM Premium gains. However, the company's third quarter share was up +0.5 points versus quarter-ago, and up +0.8 points versus year-ago.

- Marlboro's monthly share regained +0.1 point to 30.6%, likely benefiting from the retail sell through of its B4G1F and 5-pack with camera promotions. The franchise gained share in Mass Merchandiser and Drug outlets, while experiencing a moderate loss in c-stores, and showing stable performance in supermarkets.

- PM's Other Premium Brands posted a +0.1 point month-to-month share gain to 9.0%, led primarily by Merit.

- PM's Discount share was down -0.2 points versus month-ago to 7.4%, with the loss concentrated among Basic (-0.2 points) and PM PL (-0.1 point).
  – Basic's share of the Discount category declined -0.7 points to 15.4%.

- The Discount category's monthly share was off -0.1 point to 28.5%, with Basic and Doral losses more than offsetting RJR PL and GPC gains.

- RJR's monthly share was stable at 27.5%, with Winston and Doral losses offsetting Camel and RJR PL gains.

- Brown and Williamson's monthly share was up +0.1 point versus month-ago to 16.1%, with GPC accounting for the largest gain.

- Lorillard's monthly share remained relatively unchanged at 7.3%.

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Nielsen Topline Report - September 1995
October 7, 1996

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